



Exhibit 300 Assessment and Reporting in WorkLenz



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Questions?

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Analyzing an Exhibit 300 in WorkLenz

This WorkLenz guide outlines the process for analyzing an Exhibit 300 in WorkLenz. This includes reviewing Exhibit 300 answers and analyzing the scores using the *Exhibit 300 Scoring Report*. Use this guide in conjunction with the WorkLenz Version 4.5 Training Guide to learn about project portfolio management in WorkLenz.

Before beginning, below is an overview of the taxonomy, or structure, of United States Department of Agriculture (USDA) data in WorkLenz. This structure will help you identify the appropriate level in WorkLenz at which to find your investments.

<i>Portfolio level in WorkLenz</i>	U.S. Department of Agriculture
<i>Program level in WorkLenz</i>	Agency Offices
<i>Project level in WorkLenz</i>	Investments

Accessing WorkLenz

WorkLenz can be accessed at <http://worklenz.usda.gov>. Log into WorkLenz using your assigned login and password. Your login is the first initial of your first name and your last name. For example,

Name: Brenda Smith
Login: bsmith

Your initial password is '**password1**.' You will be prompted to change your password after logging in for the first time.



Navigating to the Assessment

1. After logging in, the splash screen will be displayed for a few seconds and you will be taken to the portfolio summary screen (Figure 1). Click on the project icon to view the project list screen.

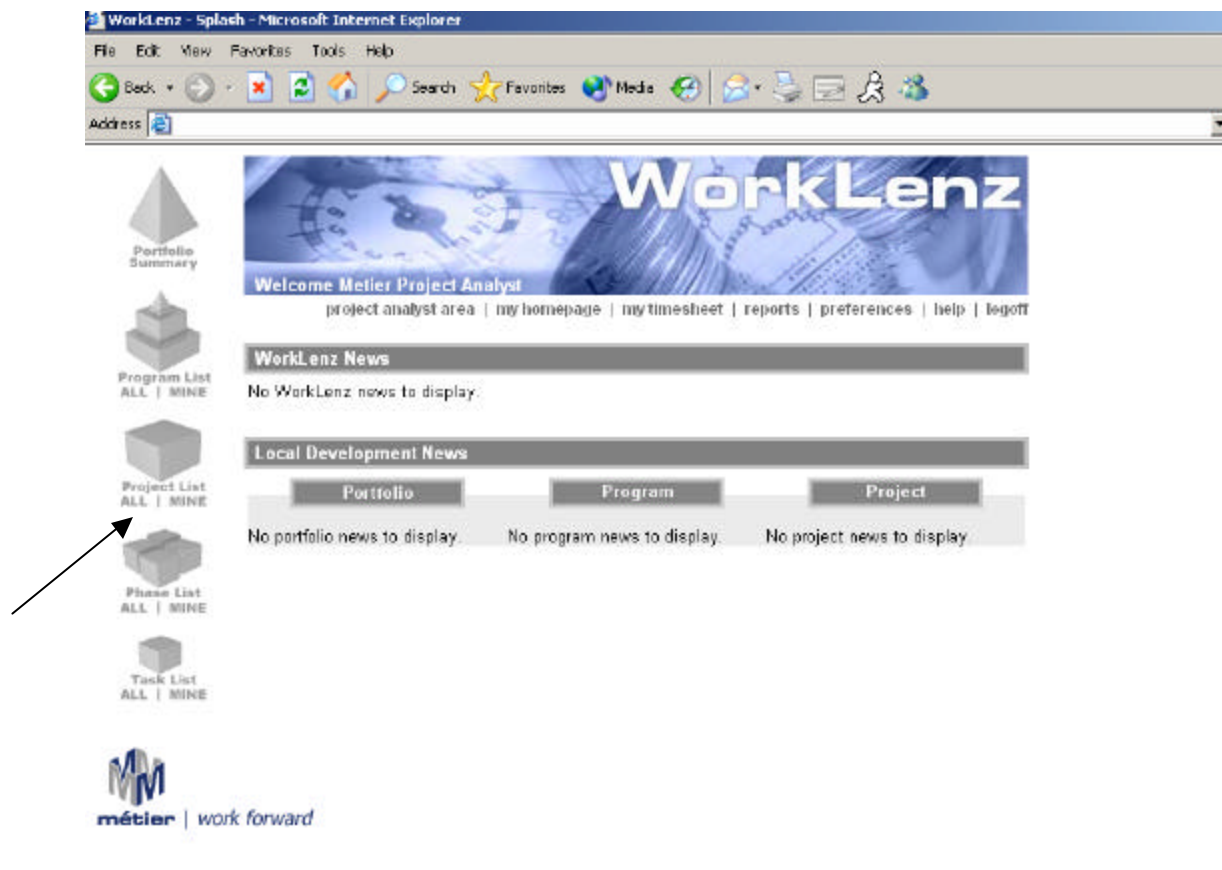


Figure 1



2. Select an investment by clicking on the investment name. You will be directed to the project summary screen for that investment (Figure 2). Click 'Admin' in the Actions bar.

WorkLenz - Project Summary - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address

WorkLenz **Project Summary**
logged in as Metier Project Analyst
USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task
Reports Personal Support Logoff

Project Last Updated : 08-05-2004 at 12:36 PM

ACTIONS: Update Now Edit Delete News
Dependencies Risk Notes
Attachments Admin New Phase

INFO

Project Title: USDA Capital Plan...
Type: Major Control
Category: Legislative Mand...
Status: Open
Estimated Start Date: 10-01-02
Actual Start Date: 10-01-02

Forecast Snapshot

SUMMARY

Financial

Current Total Estimated Labor Cost	\$695,465.51
Actual Labor Cost to Date	\$136,262.52
Projected Labor Cost Remaining	\$5,583.74
DME - Equipment Expense To Date	\$79,138.00
DME - Software Expense To Date	\$131,936.00
DME - Services Expense To Date	\$188,864.00
DME - Support Services Expense T...	\$3,452,539.00
DME - Supplies Expense To Date	\$0.00
DME - Personnel Expense To Date	\$155,018.00
DME - Other - DOD ONLY Expense T...	\$0.00
DME - Intra-Govs Payments Expen...	\$0.00
DME - Intra-Govs Collections Expe...	\$0.00
Planning Expense To Date	\$0.00

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Timeline Contents

☒ show only open work

- + Imported Life Cycle Costs Data
- + Pilot
- + REQ: Alternative Analysis
- + REQ: Business Case - Develop supporting business case material
- + REQ: Cost Planning
- + REQ: Design
- + REQ: Development - Develop FY06 supporting documents
- + REQ: Development - Issue FY 2006 budget review call memo
- + REQ: Enterprise Architecture - Manage relationship with EA group
- + REQ: Operations - Conduct monthly meetings with agencies and portfolio
- + REQ: Operations - Manage agencies and portfolio managers mailing list
- + REQ: Operations - Manage and support WorkLenz help desk inquiries
- + REQ: Operations - Manage relationship with NITC
- + REQ: Operations - Manage transition from ITIPS
- + REQ: Operations - Manage WorkLenz change control process
- + REQ: Operations - Monitor agency-level implementation of WorkLenz
- + REQ: Operations - Monitor WorkLenz support contractors
- + REQ: Operations - Provide supporting documents to agencies and portfolio

Figure 2



- From the administration screen (Figure 3), click the 'Assessments' link to view the assessment list screen. WorkLenz uses assessments to create questionnaires about projects. The Exhibit 300 is one of many assessments available in WorkLenz.

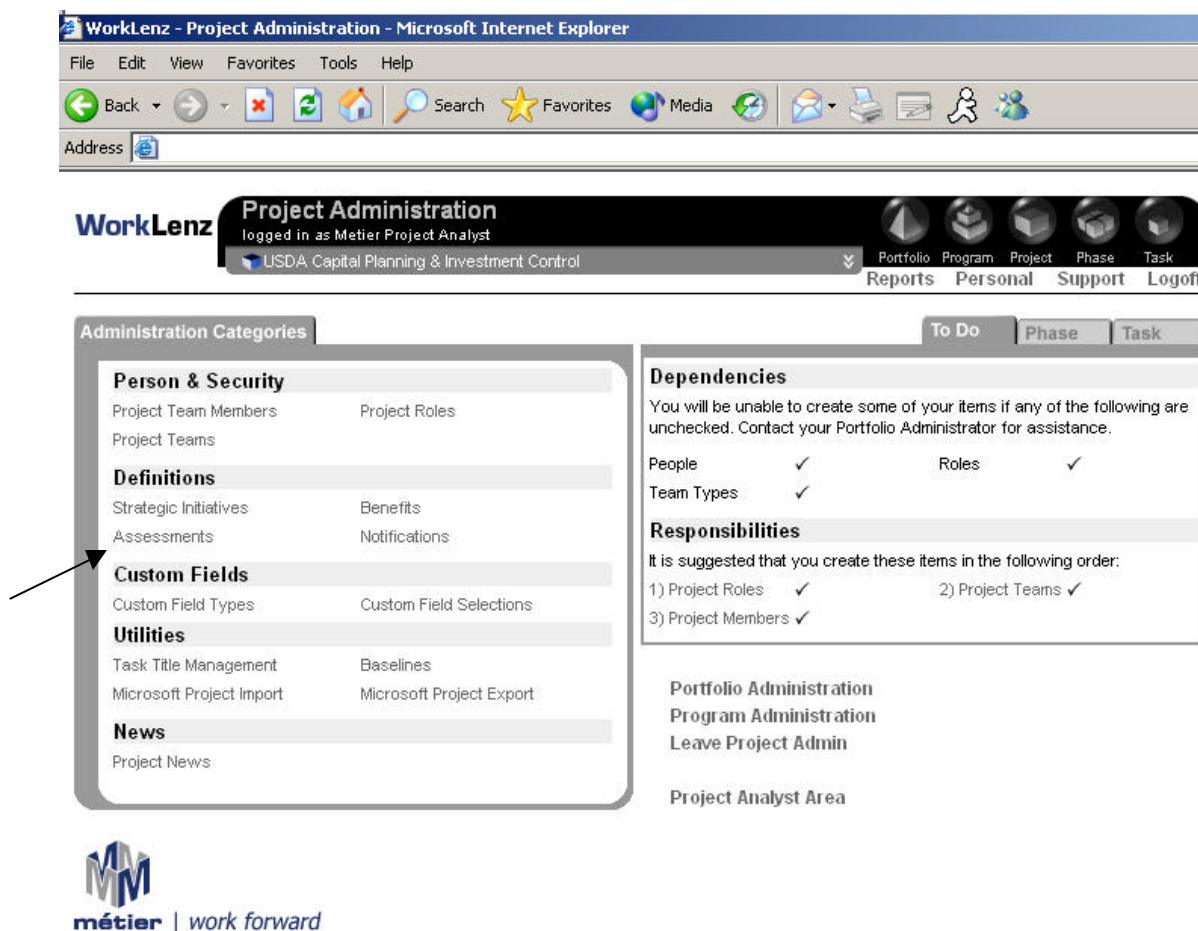


Figure 3



Assessment List Screen

4. The options with the Exhibit 300 assessment are as follows (Figure 4).
 - a. Answer: Allows editing of the answers of the Exhibit 300
 - b. Version: Creates a carbon copy of the current “view” (using the “Date last Scored” field) of the assessment. Note: only one Version can be taken per “Date Last Scored.”
 - c. View: Opens an uneditable copy of the Exhibit 300 in the following formats: standard HTML (reader/printer friendly), OMB XML, FOIA HTML.
 - d. Download: Downloads the “View” copy of the Exhibit 300 directly to a path you specify.

WorkLenz - Assessment List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address

WorkLenz **Project Assessments**
logged in as Metier Project Analyst
USDA Capital Planning & Investment Control

Portfolio Program Project Phase Task
Reports Personal Support Logoff

Assessments that apply to this item

Action	Assessment Title	Score	Date Last Scored
Answer Version View Download	Exhibit 300 FY2005	28.97	03-21-2004 04:46:40
Answer Version View Download	Exhibit 300 FY2006	36.63	03-17-2005 05:39:32
Answer Version View Download	Life Cycle Costs		03-17-2005 05:10:17
Answer Version View Download	Exhibit 300 FY2007	37.02	03-23-2005 03:19:45

Back


 **métier** | work forward



Figure 4

5. Click on “Answer” to edit the Exhibit 300.

Navigation

6. Using the “View” option in the toolbar (Figure 5), you can navigate to various sections in the Exhibit 300. In addition, there is a “Top” and “Bottom” function that will take you directly to the top of the assessment and the bottom of the assessment. The icons next to each of these functions exists in the toolbar also.

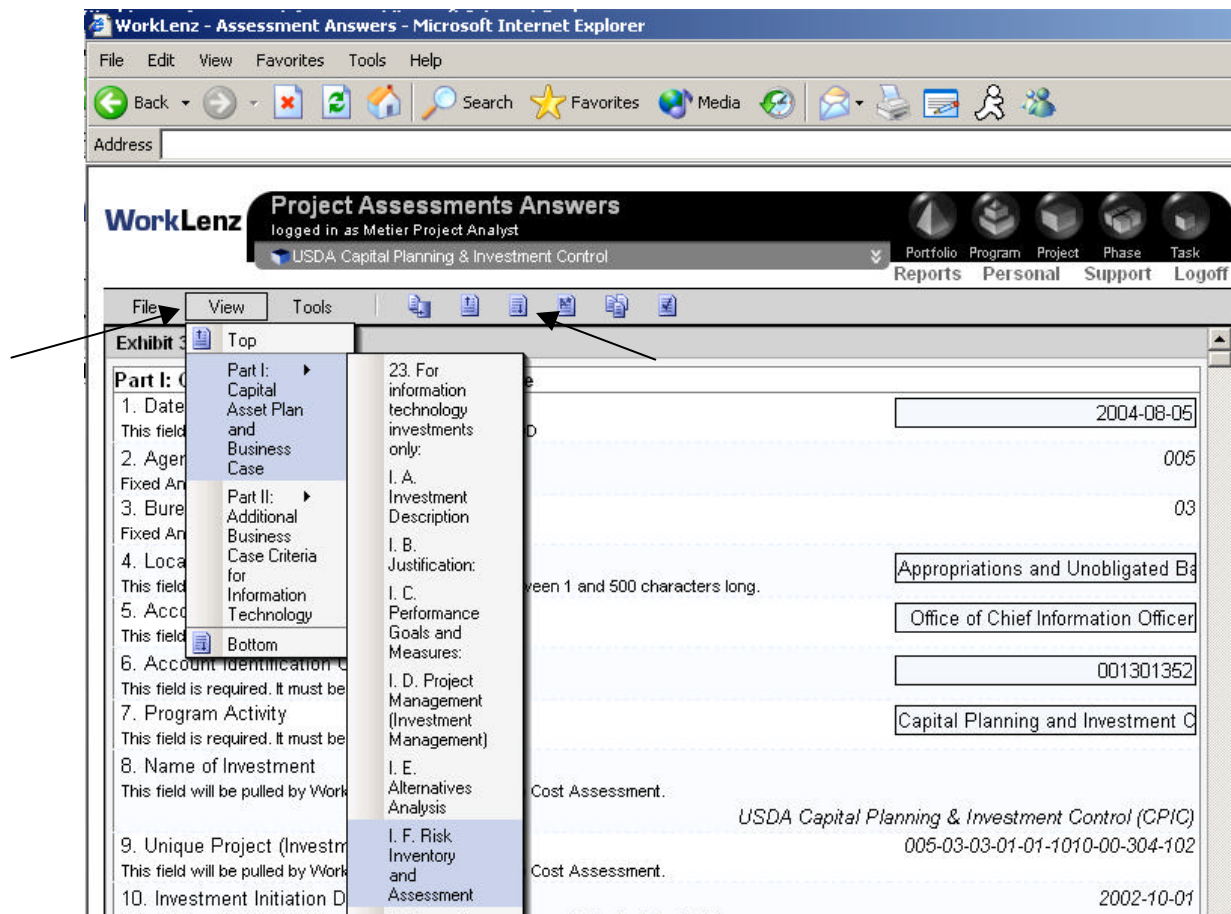


Figure 5



Functionality

7. The functionalities under “File” (not shown in screenshots) include “Store Assessment Answers”, saving the changes made in WorkLenz, and “Exit,” allowing you to return to the Assessment List screen.
8. The functionalities under “Tools” are the following (Figure 6):
 - a. Score Now: Run a series of algorithms that provides a preview of the score OMB and OCIO will provide to the investment. Note, you must Store Assessment Answers prior to validating.
 - b. Validate: Assure the data (answers to each question) is in the proper format for submission to OMB. Note, you must Store Assessment Answers prior to validating.
 - c. View Results: Provides an HTML or XML version of the Exhibit 300 business case. Note: HTML output converts the answers to text format answers; therefore, paragraph tabs and special characters are stripped out. All the information will still appear in its original format to OMB.
 - d. Download Results: Allows a download of the Exhibit 300 in the HTML and XML formats directly to a computer.

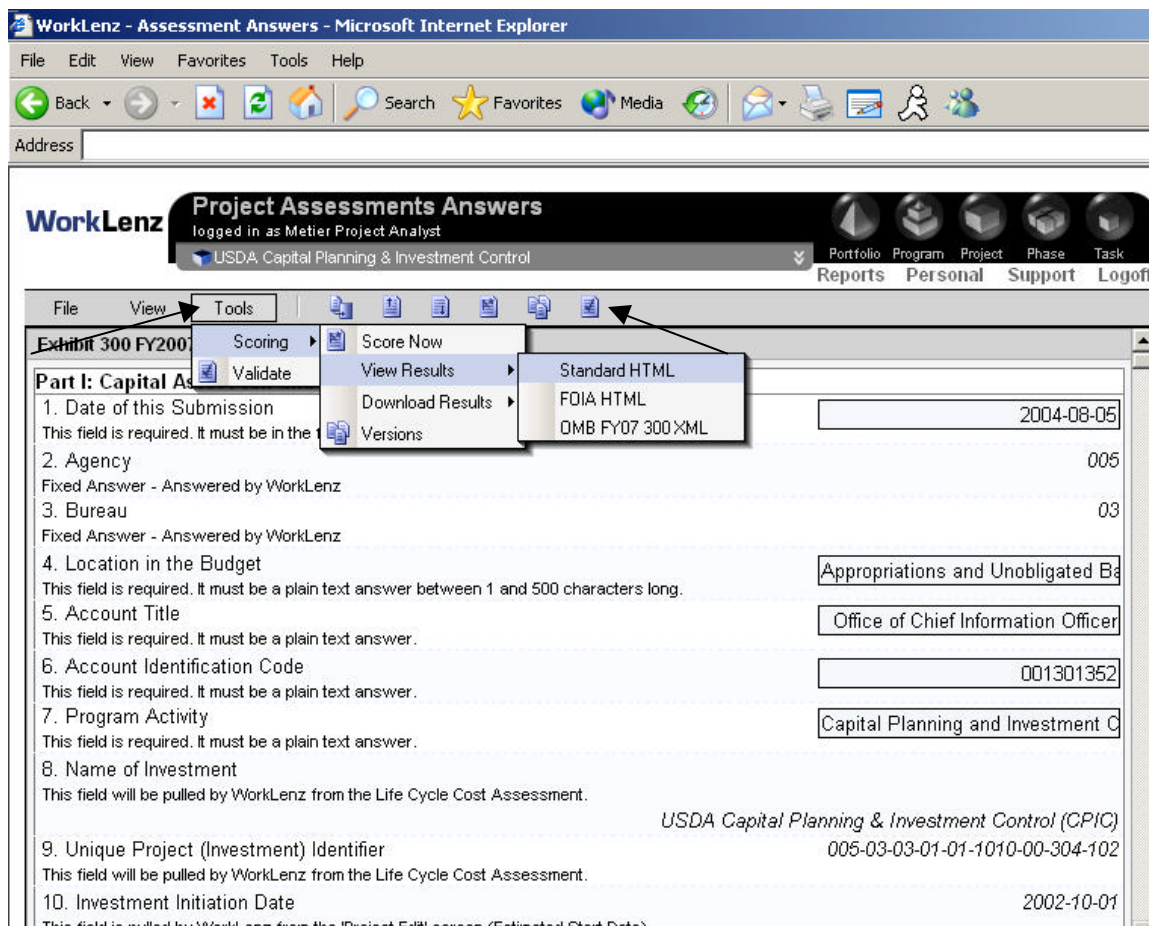


Figure 6

Editing Features

Exhibit 300 Questions: There are three types.

Fixed Answer:

Select an answer from a dropdown list (Figure 7). If the question that follows is dependent upon the previous question, it will allow you to answer or grey out the question accordingly.



File View Tools

This field is required. Please select yes or no.
19. Is this investment included in your agency's annual performance plan or multiple agencies annual performance plans? yes

This field is required. Please select yes or no.
20. Does this investment support homeland security? no

This field is required. Please select yes or no.
21. If this investment supports homeland security, indicate by corresponding number which homeland security mission area(s) this project supports?
Please select from the list below.
- Select -
no
yes
Emergency Preparedness and Resp
Intelligence and Warning
Other

22. Is this investment information technology?
This field is required. Please select yes or no. (See section 53 of the A-11 for definition.) yes

23. For information technology investments only:

23. a. Is this investment a Financial Management System?
Please select yes or no. no

23. a. 1. If so, does this project (investment) address a FFMLA compliance area?
Please select yes or no. no

23. a. 1. a. If yes, which compliance area?
Please enter a plain text answer.

Figure 7

Essay Format:

Open-ended questions that allow an essay formatted answer (Figure 8). Each text field has a scroll bar on the right hand side allowing navigation of the entire answer.

In addition, there are a number of formatting options for the text including: font color, highlight and size options, bold, italic and underlining options, right, left and center alignment options, ordered and non-ordered bullets and indentations.

Hovering over an icon in the toolbar will display the function of that icon.

File View Tools

I. A. 1. Provide a brief description of this investment and its status through your capital planning and investment control (CPIC) or capital programming "control" review for the current cycle.
This field can be entered in plain text, XHTML or Rich Text.

Font Size

As a replacement system, USDA is conducting a pilot study of Métier's WorkLenz--a software tool that supports IT project and portfolio management. USDA expects to complete this study in 2004. Currently USDA has begun migration from I-TIPS to the WorkLenz. When WorkLenz is fully implemented I-TIPS will be discontinued. Until then, I-TIPS will be used as a backup for storing CPIC data. WorkLenz provides project and portfolio management functions, along with statistical evaluation of projects to improve planning. WorkLenz will be used by project staff and oversight personnel to provide project and portfolio status.

Figure 8



Tables:

Table functionality and navigation:

1. There are a number of options to navigating the tables (Figure 9). The scroll bars on the right and bottom sides of the tables allow you to view very long tables. To enter a table, single click on the desired cell and a table cell will highlight. Navigation mode highlights the selected cell with a light background. To navigate, you may use the tab and shift + tab to move to the cells right and left respectively. You may also use the arrow keys to move up, down, right and left.

Rows	15						
	Fisc...	Measureme...	Measuremen...	Measurement In...	Baseline	Planned im...	Actual R.
	2005	Mission and	Service Quality	Number of	20	100	
	2005	Mission and	Management	% of major projects	8 %	43%	
	2005	Processes and	Management	Extent compliance	50%	95%	
	2005	Technology	Information and	Extent to which	85%	90%	
	2005	Processes and	Management	Extent to which	50%	90%	
	2005	Processes and	Management	Number of projects	3	20	
	2005	Mission and	Management	Number of	493	330	
	2005	Technology	Information and	Single tool used for	80%	100%	
	2005	Processes and	Management	IT Budget review	Annual	Quarterly	
	2006	Mission and	Service Quality	Number of	40	40	
	2006	Mission and	Management	% of major projects	43%	90%	
	2006	Processes and	Management	Extent compliance	95%	99%	
	2006	Technology	Information and	Extent to which	90%	95%	
	2006	Processes and	Management	Extent to which	90%	90%	




Figure 9

2. There are a number of functionalities to customize the tables. Columns may be resized by clicking on the column divides in the headers with the mouse and dragging them to the desired size.

New rows may be added or deleted by two methods (Figure 9):

- a. Number area: The number of rows in the row box is the number of rows in the table. Entering a higher number and clicking the refresh icon will add rows to the bottom of the table. Entering a lower number and clicking the refresh icon will
- b. Addition/Deletion icon: Clicking on the row addition icon adds a new row to the bottom of the assessment only. New rows



cannot be inserted in between two existing rows. Select the row you want to delete by clicking on the grey area to the far left of the data row. The far left cell will turn from  to . Click the delete row icon  in order to delete the row.

Data entry:


3. There are two methods for entering data into tables:
 - a. Direct entry (Figure 10): This method allows you to enter data directly into cells throughout the data table. To edit a cell, double click on the cell or begin typing into the cell. The cell will go from highlighted to not highlighted.

Fisc...	Measureme...	Measuremen...	Measurement In...	Baseline	Planned im...	Act
2005	Mission and	Management	% of major projects	8 %	43%	
2005	Processes and	Management	Extent compliance	50%	95%	
2005	Technology	Information and	Extent to which	85%	90%	
2005	Processes and	Management	Extent to which	50%	90%	
2005	Mission and	Management	Number of	493	330	
2005	Technology	Information and	Single tool used for	80%	100%	
2005	Processes and	Management	IT Budget review	meetings of the E-Board	Quarterly	
2006	Mission and	Service Quality	Number of	40	40	
2006	Mission and	Management	% of major projects	43%	90%	
2006	Processes and	Management	Extent compliance	95%	99%	
2006	Technology	Information and	Extent to which	90%	95%	
2006	Processes and	Management	Extent to which	90%	90%	
2006	Processes and	Management	Number of projects	20	35	

Figure 10



- b. Form data entry (Figure 11): This method allows you to enter the data for an entire row into a popup form. To enable the form, click on the edge of the row you want to edit and click again on the row

edit icon  on the selected row. A form will pop up with an entry field for every column on the selected row (highlighted). Click on each entry field to edit the data. Fields that appear with dropdown lists only are enumerated values and you may only select from the values provided. Other fields are data specific (such as dates and monetary fields) and will only allow data to be entered in a specific format required by OMB. Click OK to save the data to the row.

Fisc...	Measureme...	Measuremen...	Measurement In...	Baseline	Planned im...	Act
2005	Mission and	Service Quality	Number of	20	100	
2005	Mission and	Management	% of major projects	8 %	43%	
2005	Processes and	Management	Extent compliance	50%	95%	
Fiscal Year:				2005	85%	90%
Measurement Area:				Mission and Business Results	50%	90%
Measurement Category:				Service Quality	493	330
Measurement Indicator:				Number of Individuals trained in Pr	80%	100%
Baseline:				20	40	40
Planned improvements to the Baseline:				100 (Increased because budget c	43%	90%
Actual Results:					95%	99%
					90%	95%
					90%	90%

OK Cancel

Figure 11



The FY2007 Exhibit 300 Scoring Report

1. Click the 'Reports' link in the utility menu (Figure 10) to launch the Report Center. This menu is available on the splash screen (the first screen seen after logging in) or the upper right hand corner summary screens.



Figure 10

2. The Report Center will open in a second browser window. The *FY2007 Exhibit 300 Investment Scoring Report* is available at the Project level only.



Figure 11

3. Expand the 'Performance' link and the 'Custom USDA' link to select the *FY2007 Exhibit 300 Scoring Report* (Figure 12).
 - a. Project level – Select a program office and an investment and click 'work forward.'

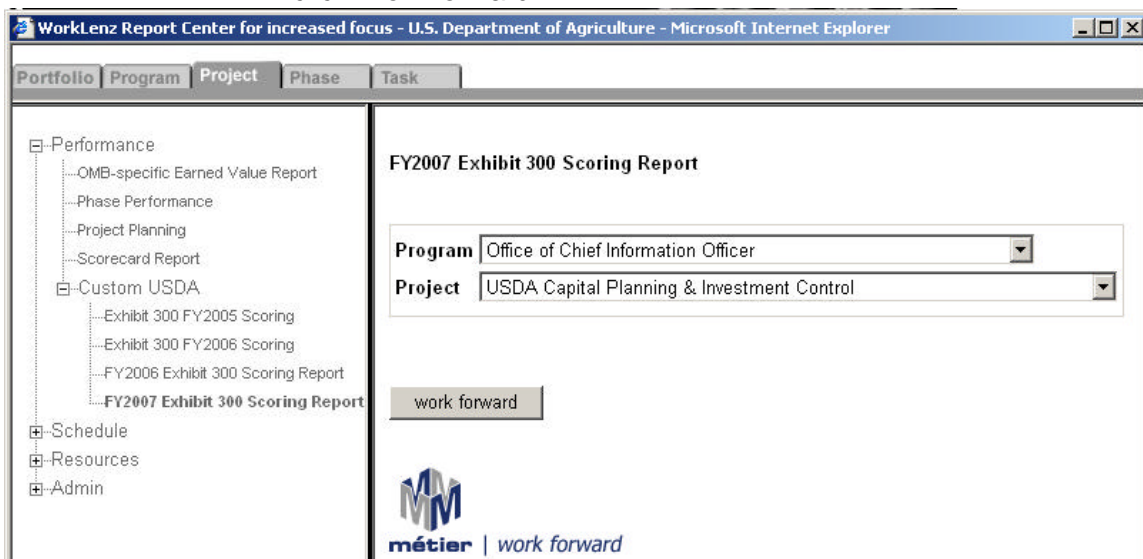


Figure 12



4. The report provides general information about the investment selected (not shown in the screenshot). Following this, the report provides a scoring range for each section based on the Exhibit 300 pre-scoring algorithms. This is not the final score of OMB but a prediction of what OMB will provide based on the answers to the questions in the Exhibit 300. For each section, improvements based on the answers to the section questions are provided. Each improvement references a specific question (Figure 13). The report finishes with an estimated overall investment score range.

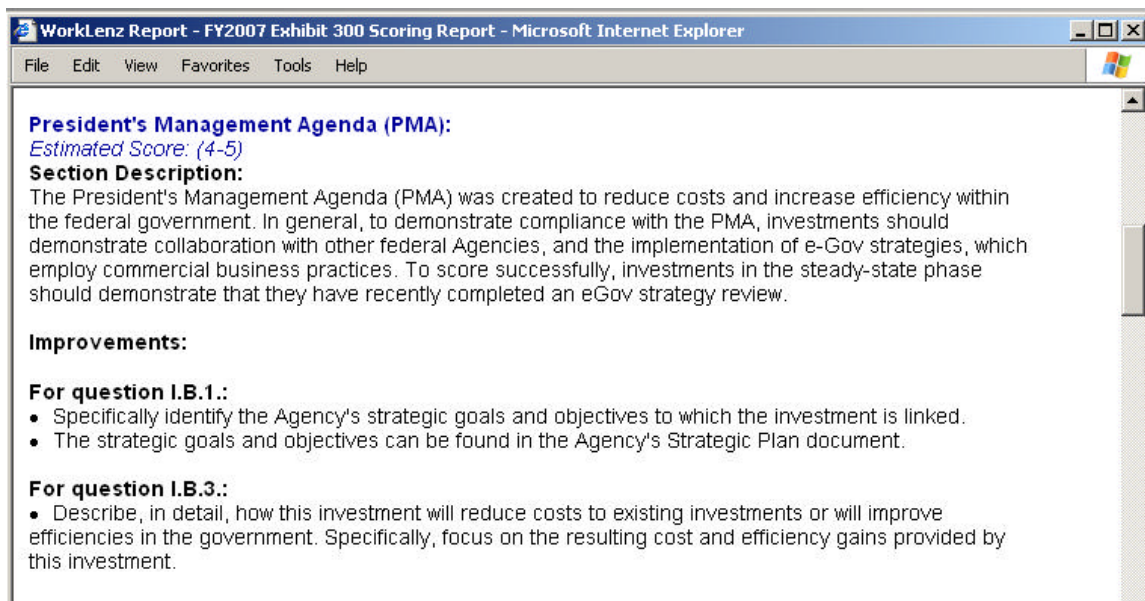


Figure 13